7A PART I: FEATURES

Sales Order Entry

- After entering the customer, the system now allows the operator to enter a 'G' to get the list of open quotes for this customer and select a quote to turn into an order. Prior to this the operator had to skip through the header screen and enter the 'G' at line one of the items and then go back to the header screen to review it. This was quite awkward, so we have corrected the flow of the entry here.
- When entering an item or changing the price on an item; the screen now shows the unit price after the quantity available to sell.
- When e-mailing an order acknowledgement, allow copies to be sent to additional e-mail addresses.
- When creating a quote, show the default expiration date and allow the operator to change it.
- If the Sales Order Entry Prompt Control #3 TRADE DISCOUNT for a terminal is set to 'N', this now carries over to Order Inquiry and Invoice Retrieval Inquiry. This has proven useful for operators that prefer to always see the net unit price.
- Allow cash sales to be direct shipped to customers. The customer order must be paid in full, including any freight and misc charges. When the vendor's invoice is entered (just as it is for direct shipments on charge sales), the material is shipped and invoiced, and the deposit is applied against the invoice.
- Sales History Inquiry by Item – allows operator to enter 'OR' and display Order Entry history for the item.
- Made the document box wider on invoices printed with UnForm (move page # to the left).

Quotes

- New quotation parameters have been added and implemented:
  - Give option to print cat/item/house # on quotations? (Y/N)
  - Prompt to transfer special instructions to order? (Y/N)
  - Default to transfer special instructions to order? (Y/N)
  - Prompt for printing of special instructions? (Y/N)
  - Prompt to transfer line comments to order? (Y/N)
  - Default to transfer line item comments to order? (Y/N)
  - Prompt for printing of line comments? (Y/N)
  - Prompt for expiration date at quote creation? (Y/N)
- Quote Entry and Quote Maintenance have been modified to show the Unit Price and extended price when the line items are displayed. When adding a line or changing an existing line, the unit price and the gross profit percent have been added to the screen.
- When e-mailing a quote to a customer, allow copies to be sent to additional e-mail addresses.
- On the document output screen the system now offers the choices to email, fax, or print a 'REQUEST FOR QUOTE'. If one of these is selected, the system asks for the vendor that the document should be sent to. The document says 'REQUEST

FOR QUOTE' at the top and it does not show any pricing. If these are sent, they are written to the output log for the quote so that the operator can verify the vendors that the request was sent to.

Products

- Products by Matrix Sell Report – ask if selections are correct before print.
- Programs to change UPC # - update Pro-Forma P.O.'s pending.
- Product parameter to 'not select backorders' - at month end close, set quantities to zero and write to logs.
- PRODUCT MAINTENANCE (PMM MENU) - When there is a unit of measure change in Product Maintenance, ask the operator if WAC/LCP and price exceptions should be updated.
- Inventory Class Report – option to input XX and just print those items
- PRODUCT MAINTENANCE (PMM MENU) - Makes manual entries in the Last Cost Paid log when an operator changes this in Product Maintenance. All other places that Last Cost Paid is changed also write a record in the log.
- PRODUCT MAINTENANCE (PMM MENU) – a new option has been added at the bottom of Screen #1 'PR'(Pricing) that shows the pricing for the five p-codes, how the calculation is done at each level, and the gross profit percent.
- Import Product Information (FLI menu) – the option to import product groups has been added.

- **CHANGE PRODUCTS BY MATRIX SELL (PMM MENU)** – allows operator to make the last digit of the commodity code a star '*' to act as a wild card or the last two digits by using '**'. This is being precipitated by the commodity codes being broken down in to much more detail by Trade Service during the last few years.

- **CHANGE PRODUCT MATRIX SELLS (PMM MENU**) – this program has also been modified to prevent the operator from indicating that they wish to change all items to the same matrix sell. If all manufacturers, all commodity codes, all existing matrix sells, and all product groups are selected then a warning message is given and the operator is returned to the start of the selections.

- **CHANGE PRODUCT GROUPS (PMM MENU)** – this program has been modified to prevent the operator from indicating that they wish to change all items to the same product group. If all items or all manufacturers, and all existing commodity codes and matrix sells are selected then a warning message is given and the operator is returned to the start of the selections.

- **UPDATE ITEMS PER MULTIPLIERS (PRS MENU)** – This program is normally used to update replacement cost or order base for lines that are updated by a Pricing Service. When a change is made to the table where the multipliers are set up for these calculations, then the changes can be put into affect immediately by running this program. It has been modified to prevent the

operator from indicating that they wish to change all items. If all items or all manufacturers, and all existing commodity codes and matrix sells are selected then a warning message is given and the operator is returned to the start of the selections.

- The **labels** that can be printed with **Zebra printers** have been given an overhaul in this release of the software and new label formats have been added.
- PRINT PURCHASE ORDER RECEIVING LABELS – This program prints labels to do purchase order receiving in two different formats. One format is for stock items and the other is for non-stock items.
- PRINT LIGHTING SHOWROOM TAGS (BAR MENU) – This program prints the tag information that has been entered on specified customer order lies on 4x4 labels on Zebra printers
- PRINT PRODUCT SHELF LABELS (BAR MENU) – This program prints product shelf labels for individual items, a range of items, an entire line, or by matrix sell. The mfgr id, catalog #, description, and UPC # are printed on 4x4 labels on Zebra printers
- PRINT LIGHTING SHOWROOM TAG LABELS – This program prints order tags labels for packaging. It prints the order #, ship to name, job, purchase order, tag quantity, mfgr ID, catalog #, and tag text.

Accounts Payable
- A/P Invoice Data Entry Register – if there is no register for the terminal, the software explains this, rather than telling the operator that it cannot open a file.
- Track the A/P terms code in A/P Open Invoice File and display on the screen.
- A/P Vendor Master File – 25 characters field for account # has been added.
- A/P Cash Disbursements are now written to the G/L detail transaction file for posting inquiry on the GLB menu.
- A/P invoice data entry – added ability use F2/F3 to cycle through terms
- Accounts Payable – allow credits of up to -99,999,999.00

Miscellaneous
- Terminal # and time have been added to more reports
- The question mark (**?**) has been added to more screens to display a window that shows the meaning of each of the codes that can be entered.
- Forms printed with Unform – allow entry of website information in Branch File Maintenance and print this on invoices, pick tickets, purchase orders, A/R statements, quotes, and order acknowledgements printed with Unform.
- E-mail of quotes, order acknowledgements, invoices, and purchase orders: use e-mail address of operator (if present) to fill in 'from' address for sending documents.
- Allow for 45 character e-mail addresses.
- Invoice Price Discrepancies Report – print line item comments on report
- Keep the batch # in each record in Monthly Cash Receipts Journal and print on the report.

- Add branch # to General Ledger Batch Header Information
- Executive Summary – we have added a column in the Sales Section for the profit and the profit percent. We have also added pending sales so that you can see the sales pending throughout the day. This includes cash sales and invoices that have been printed and updated to the Invoice Register.
- Customer Pricing Maintenance – Individual Item Exceptions – allows entry of <F1> after each item to bring up the next item in the Product File.
- Create File for Customer Sales History by Item (FLE MENU) – headings are now printed for the files.
- Monthly Rebate Reports – additional format #4 has been added for Juno Lighting
- Copy Rebates to new Reference # – this is a new program that has been added to the REB menu that allows you to change all the rebates set up for a customer from one reference # to a new reference #.
- Purchase Order Processing – two new parameters have been added:
  TRANSFER ORDER LINE COMMENTS FOR SPECIALS? (Y/N)
  PRINT FLAG FOR LINE COMMENTS FOR SPECIALS ON P.O.? (Y/N/O)
  If the first parameter is set to 'Y' then the line items comments from the order are copied to the p.o. for all specials. The print flag is set the same as it is on the order if the second parameter is an 'O', otherwise it is set to the 'yes' or 'no' default.
- Year-End Physical Inventory – when rolling the cards for a vendor, track the date they were rolled by vendor and present this as the starting date when the operator views the Transactions by Item.
- New transfer parameter for the # of days to keep transfers before deleting, prior to this it was always 7 days.
- Transfer Shipping – if an item has been shipped, the operator can enter 'AJ' to unship it as long as it has not already been received.